



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

April 6, 2009

Transmitted Via E-

Mail

Alma Azarcon, Director of Human Resources and Operations

Give Something Back Business Products

7730 Pardee Lane

Oakland, CA 94621

aazarcon@givesomethingback.com

Dear Ms. Azarcon:

RE: FINAL MONITORING VISIT REPORT for Give Something Back (HUA) – ET08-0144

Date of the Visit:	1/6/09
Beginning/Ending Time:	4:00 – 5:15 pm.
Date of Last Visit:	8/6/08
Visit Location:	Oakland
Persons in attendance:	Alma Azarcon, Give Something Back (GBS); Janice Ballard, Sallyanne Monti Consulting; and Teresa Teles, ETP
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	7/30/07 - 7/29/09	Agreement Amount:	\$235,040
Reimbursement Rate:	\$26	No. to Retain:	80
Date Training must be Completed:	4/29/09	Range of Hours:	24 - 200
Type of Trainee:	Retrainee	Weighted Ave. Hours:	113

PROJECT STATUS:

Trainees Started Training:	88	Completed Minimum Hours :	58
Trainees Enrolled:	88	Completed Maximum Hours	16
Dropped Following Enrollment:	49	Completed Training and Retention:	39

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ETP (04/15/05)

Your retained a total of 39 trainees (49% percent of planned retentions) for a total reimbursement of \$154,158, (66 percent of the encumbered amount). This training was planned to provide train-the-trainer skills and to pilot several initiatives. GBS did not earn all the funds because by the time the train-the-trainer and pilot programs were completed, there was much time left in the Agreement. At staff's recommendation, the project was closed early to allow training to begin in the second project GSB returned to the panel to request a new agreement for additional funds and a full two years which was necessary to implement the pilot programs as some of the trainees will also be in the second agreement

INTERVIEW WITH THE SIGNATORY

- What barriers, if any, did your company experience in implementing your ETP project?
No barriers were encountered.
- What problems, if any, did your company experience with ETP record keeping?
No problems in recordkeeping
- What assistance could ETP have provided that would improve the process for future Contractors?
None needed as company had an administrative vendor.
- How did your company benefit from the ETP training?
GSB was able to launch several initiatives that impacted all areas of the organization and training was needed to train trainers and other employees to be able to implement the changes company-wide. GSB is poised to implement company-wide initiatives in technology, customer satisfaction, and green business services that were piloted with the help of ETP funds.

Most noteworthy initiative was a pilot project on sustainability and green business services to assist customers to become eco-efficient. The company trained key staff to be able to produce a green audit of customer's purchases, provide green alternatives, and provide information on green business practices. Further the company initiated a take-back box program where boxes are re-used which is also available to competitors that use the same vendor.

ATTENDANCE ROSTERS:

Ms. Teles reviewed the completion of training for a sample of trainees. The hours on ETP's Tracking website, for the sample of trainees reviewed, were supported by training documentation that met ETP requirements.

NOTE: Your in-house project administrator had not noticed that rosters 417 through 434 and roster 438 were missing. The administrator vendor, Ms. Ballard, had a record that the rosters had been mailed back to GSB. Ms. Ballard also had an electronic record of the missing rosters. Ms. Teles reviewed the electronic copies and had you print them and file them in the binders with the other rosters. Copies were approved by Ms. Teles since the originals were lost – probably in the mail – but complete copies were available for review and audit.

AUDIT:

Give Something Back will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk audit (or "review"). These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit

Confirmation letters. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:


Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding this report, please contact Teresa Teles at (650) 655-6940 or at tteles@etp.ca.gov within ten (10) working days from receipt of this report.

Sincerely,



Creighton Chan, Manager
San Francisco Bay Area Regional Office



Teresa Teles, Analyst
San Francisco Bay Area Regional Office

cc: Janice Ballard, jb.saconsult@yahoo.com
Kulbir Mayall, Manager, Fiscal and Certification
Master File
Project File

Date report mailed to Contractor 4/6/09